

INFLUENCING OTHERS: APPLYING BASIC SKILLS

4-E



Job Performance
Situation 4:
Building Collaboration
in Head Start

HEAD START
MOVING AHEAD
COMPETENCY-BASED TRAINING PROGRAM



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REFERENCE

This activity develops skill competencies in influencing others. Participants will learn to use social marketing strategies to create a climate of support for collaboration, foster awareness of collaboration activity among staff and colleagues in their home organizations, recruit partners for a collaboration, promote an existing or proposed collaboration to the community at large. Participants will also learn to use social marketing to reach key decision-makers in an effort to strengthen their collaborations and develop plans to market the collaborations and influence others.

Related skills include 3-C, Facilitation: Fundamentals of Leading Meetings; 3-G, Communication: Written Communication; 4-C, Collaboration: Managing Your Role; and 5-D, Presentations: Developing Effective Presentations.

Sources:

Wallack, L., Dorfman, L., Jernigan, D., and Themba, M. 1993. *Media Advocacy and Public Health: Power for Prevention*. Newbury Park, CA.

Fine, S.H. 1990. *Social Marketing: Promoting the Causes of Public Health and Nonprofit Agencies*. New York: Allyn.

Manoff, R.K. 1985. *Social Marketing: A New Imperative for Public Health*. New York: Praeger.

Stern, J.G. 1990. *Marketing Workbook for Nonprofit Organizations*. St. Paul, MN: Amherst H. Wilder Foundation.

McQuail, D. 1983. *Mass Communication Theory*. Newbury Park, CA: Sage Publications.

Head Start Focus Group on Collaboration, Washington, DC, July 8–9.

Deming, W. E. 1993. *Out of Crisis*, 20th printing. Cambridge, MA: MIT Press.

Andrew Kennedy, Los Angeles County Office of Education. 1999. Head Start Focus Group on Collaboration, Washington, DC, July 8–9.

Kotler, P., and Roberto, E.L. 1989. *Social Marketing: Strategies for Changing Public Behavior*. New York: Free Press.

OVERVIEW

INFLUENCING OTHERS: APPLYING BASIC SKILLS

Outcomes. Participants who complete this activity will be able to:

- Recognize the value of social marketing as a strategy to improve services for children and families.
- Identify areas of influence in specific Head Start collaborations.
- Recognize the importance of successful collaboration of targeted, ongoing communication.
- Apply a step-by-step process to the promotion of a collaboration.
- Identify and utilize resources within their own organizations and the wider collaboration to accomplish the work.

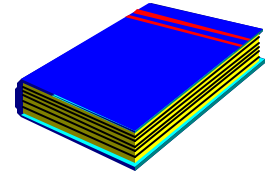
Materials. Newsprint and markers.

Components. This activity can be completed by one person, an informal group, or as part of a formal workshop. Suggested time limits are provided below, but participants and facilitators may wish to adjust these to their own timetables.

Step 1. Background Reading: Understanding the Basics Handout: Communicating in Harmony	15 min. 5 min.
Step 2. Worksheet: Analyzing the Situation	35 min.
Step 3. Background Reading: Creating a Climate of Support for Collaboration	20 min.
Step 4. Worksheet: Using Marketing Tools to Influence Others	35 min.
Step 5. Summary	10 min.
Suggested total time	2 hrs.

This activity contains 30 pages.

STEP 1. BACKGROUND READING: UNDERSTANDING THE BASICS



Suggested time: 15 min.

Study the following reading. Feel free to highlight sections or write comments in the margin throughout these activities.

I. SOCIAL MARKETING: NEW USES FOR AN OLD INDUSTRY

When Head Start began in the mid-1960s, “marketing” was a word that belonged to the world of cigarettes, junk food, sneakers, and cereals—not to the world of nonprofit social service agencies or family development programs like Head Start. Yet, as the science of social marketing has evolved, marketing has come to play an important role in the planning and successful implementation of health and social service efforts.

Today, social marketing can offer tools and techniques that Head Start leaders can use to help improve services for children and families. There may be occasions when a community collaboration will need to launch a full-scale marketing campaign, but that is not the main reason to have a working knowledge of social marketing. The concepts and techniques of social marketing can be adapted to communicating clear messages to influence the people that can make a difference in the success or failure of a collaboration.

“The marketing process,” says Lawrence Wallack, “attempts to facilitate a voluntary exchange that provides the consumer with tangible benefits at minimal monetary, physical, or emotional costs.”¹ Social marketing takes marketing concepts and techniques that have proven effective and applies them to promoting public health and social causes. Like commercial marketing, it is research-driven—“not what we think but what they think,” as one social planner has said. It is not the public service announcement (PSA) on television or the highway billboard—it is all the analysis and planning that lead up to the PSA or the billboard.² The concepts and techniques of marketing have been adapted and applied to a wide range of

¹ Wallack, L., Dorfman, L., Jernigan, D., and Themba, M. 1993. *Media Advocacy and Public Health: Power for Prevention*, p. 22. Newbury Park, CA: Sage Publications.

² Fine, S.H. 1990. *Social Marketing: Promoting the Causes of Public Health and Nonprofit Agencies*. New York: Allyn; Kotler, P., and Roberto, E.L. 1989. *Social Marketing: Strategies for Changing Public Behavior*. New York: Free Press; Manoff, R.K. 1985. *Social Marketing: A New Imperative for Public Health*. New York: Praeger;

agencies and causes unknown to the original Madison Avenue inventors of marketing.

Opinions about marketing for nonprofit causes shifted over time from the view that it was dangerously commercial (or at least irrelevant) to the belief that it is promising and effective. Innovations came first in the area of health. The 1969 White House Conference on Food, Nutrition, and Health included a panel titled “Popular Education: How to Reach Disadvantaged Groups through the Media of Mass Communications.” Health and nutrition educators reported encouraging results from the use of mass communication, especially in developing countries. In 1978, the United Nations Conference at Alma-Ata articulated principles of health care that named “education about prevailing health problems and methods of controlling them” the first of eight principles.³ Equally important, the conference emphasized the importance of community-based planning—involving people from the target group in plans for designing and disseminating messages. Ideally, social marketing involves the mobilization of local organizations and interpersonal networks as vital forces in the behavior change process.⁴

Some of the techniques used in social marketing efforts are the same as in commercial marketing: analysis of the target audience (often through focus groups), market research (both message design and testing), media analysis, and effectiveness tracking. The difference is in the purpose: instead of trying to induce sales, these efforts attempt to raise awareness in order to change behavior. Family planning, anti-tobacco efforts, AIDS prevention, car restraints for children, and child immunizations are some of the health and social causes that have adopted marketing techniques to raise awareness of issues and bring about change on the part of different audiences.

Understood clearly, adapted with care, and carried out in a professional manner, social marketing offers a useful tool to Head Start leaders who are interested in enhancing their capacity to collaborate with other partners in the State and the community.

³ Manoff, R.K. (1985). *Social Marketing: A New Imperative for Public Health*.

⁴ Wallack, L., Dorfman, L., Jernigan, D., and Themba, M. 1993. *Media Advocacy and Public Health*, p. 22.

⁴ Stern, J.G. 1990. *Marketing Workbook for Nonprofit Organizations*. St. Paul, MN: Amherst H. Wilder Foundation, p. 21.

II. KEY ELEMENTS OF SOCIAL MARKETING

Social marketing involves much more than a catchy slogan or colorful pamphlet. Careful research and planning take place before the message goes out. Head Start leaders who use social marketing techniques can follow the process used by experts. First, think about what you want to achieve and the people you want to influence: internal staff, potential partners, the community at large, and key decision-makers. Then think about the best ways to reach these people, the kind of message you want to send about the collaboration as it develops, and the best format for conveying the message. Finally, think about how to put these elements together in a planned and thoughtful way, toward the goal of better serving children and families.

Purpose: what you want to achieve. There is a reason that you think it is important to reach out to others and communicate something about the collaboration. Specify what you hope to accomplish if you are successful in this effort to market the collaboration. Ask yourself, “If we are successful, how will people respond?” For instance, you may want to build community support for a new health delivery facility—a teen health center—and hope that individuals and groups will back you when the public hearings take place.

Audience: the people you want to reach. “General public” is not a helpful phrase when it comes to marketing. It assumes that there is a vast, undifferentiated crowd out there, with everyone equally interested in hearing the same message. However, the truth is very different. As one researcher describes it, “within massive general audiences are numerous small, selective, or local audiences for which the possibilities of interaction are greater than suggested by the classic definition of a mass audience.”⁵

Consider this: Latino parents, single mothers, health service personnel, city council members, and newspaper editors may all have something to say about the proposed facility. While your agency may have important messages for each of these groups, the messages are likely to differ somewhat in each case. Latino parents may be concerned with language in the new facility; single mothers with fees; health service personnel with the health services to be delivered and issues of competition; city council members with costs and political implications; and newspaper editors with what is newsworthy and/or controversial.

⁵ McQuail, D. 1983. *Mass Communication Theory*. Newbury Park, CA: Sage Publications.

“Audience segmentation” takes into account the differentiated groups of people you may want to reach. Each group is characterized by certain traits (e.g., skills, experience, age, gender, ethnicity, and role in the community or collaboration). Consider the characteristics that are important to you, and construct a list of the segmented audiences you want to reach and the reasons you want to reach them.

Channels: the outreach mechanisms available to reach the audience(s). These include media (community newspapers, radio, cable and network television, transportation posters) and outlets through other groups or organizations (newsletters or bulletins).

Message: what you want to say to each of the audiences. Framing a message is a two-part effort. It is important to focus not only on what you want to say; but also what your audience knows, is concerned about, and interested in. For instance, you may want to tailor one message for single mothers about sliding-scale fees and another for health care providers that assures them of the quality of services and reassures them about referrals. Use focus groups to find out about the audience’s interests and concerns before messages are developed, then conduct message testing with sample members of the audience to find out which messages play well. The Head Start Policy Council or Parent Committee might serve as the focus group in this case. Your Health Services Advisory Committee could be a focus group of health care providers.

Format: the type of “packaging” for the message. Formats might include presentations for scheduled meetings; targeted mailings; fact sheets; newsletters; brochures, pamphlets, or flyers; press releases; newspaper articles or editorials; transportation posters on buses or subways; and information packets for legislators, advisory board members, or other decision-makers.

Campaign: the plan that spells out the individual activities and how they will all fit together. Adapting the concept of a marketing campaign, a community agency such as Head Start might think about an Outreach Planning Matrix that enables collaboration leaders to track what they plan to do, who is doing what, and when these tasks will be done.

III. SPECIFIC MARKETING TOOLS AND ACTIVITIES

Various formats are available for use in marketing the collaboration and sending specific messages to targeted audiences. It is helpful to understand what each format offers as preparation for thinking of the best ways to align message, format, and audience.

Presentation for Scheduled Meetings: A well-planned presentation, held with representative key constituents can be the best format for conveying messages and making requests to decision-makers (see Activity 5-D, Presentations: Developing Effective Presentations). For instance, local program leaders may use this method to present plans to the town council for opening a new center, while Federal staff may use it to make presentations at regional conferences.

Targeted Mailing: A letter tailored to the needs of the audience gives you the opportunity to speak to the concerns of that audience and put before them—in writing—key facts, specific plans, or a specific request for assistance. For instance, the collaboration partners may use a mailing to both Head Start and child-care parents to describe how the collaborative plans to expand service hours and locations. Federal staff, in collaboration with the Head Start State collaborator, might use a mailing to reach all local Head Start programs to bring together teams from Head Start and other community agencies for planning purposes. Be sure that the letter includes a contact person (not necessarily the person who signs the letter) that people can call if they have questions. It is often helpful to include an additional fact sheet, flyer, and/or brochure.

Fact Sheet: A 1- to 2-page, very succinct document that presents the basic facts, statistics, information, or intentions of the agency or collaborative. It could be used as an enclosure in a letter, with a press release, or in an information packet to be handed out. Fact sheets are usually produced on 8½-by-11-inch paper, with black ink on white paper so that they can easily be reproduced. For instance, the collaborative may develop a fact sheet that outlines the partners, purpose, and proposed activities; a timeline; any additional funding sources; and a contact person.

Newsletter: A 2- to 8-page, folded, designed document with information such as previews of coming community or professional events, reports on past activities, updates of ongoing activities, or a

short feature that highlights a particular program or aspect of the program. Newsletters may also contain reviews of relevant books, a brief digest of recent research, a profile of a staff person, a message from the director, or a calendar of community events. A newsletter is usually designed with a logo, two-color design, and two-column format. Until your collaborative is well along, you are more likely to provide information to other organizations that can be used in their newsletters, rather than producing your own.

Brochure, Pamphlet, or Flyer: This format offers substance—not just description—to the reader. For instance, a program, service, or educational course may be laid out in a brochure. These documents may be simple 1-page flyers or complex 16-page brochures. A flyer may be black or another color text on a white background, but will include some design elements. Pamphlets and brochures, on the other hand, are more highly designed than flyers, with graphic elements and photographs. They are written in a way that uses headings, subheadings, and lists to carry the reader along. Brochures and pamphlets create more of a “presence” than fact sheets or 1-page flyers, and are useful when there is a broad audience to reach with a format that will carry an impression of stability and importance. For instance, if the collaborative has worked to provide coordinated services in a one-stop-shopping family center, it might create a 2-color, 4-page brochure that outlines the schedule and services offered.

Press Release: A 1- to 2-page document with a headline, a sub-headline, and a few paragraphs of information, this format is used to inform local media outlets (newspapers in particular) of newsworthy events. Press releases are also used to interest the press in covering the event or running an article or editorial in the paper. For instance, a collaborative sponsoring a health fair might send press releases to the community’s major daily and smaller weekly papers, as well as all of the participating community organizations and agencies. Be sure to include a contact person and an embargo date (the date you want the material used), and arrange the paragraphs so that the most important information comes first at the beginning of the article. If there are space limitations, an editor will cut off the story where necessary, so don’t hold out crucial information until the end.

Newspaper Article or Editorial: As a rule, the paper’s staff writes articles and editorials. While major dailies receive more news releases than they can use, smaller community newspapers are hungry for news and have a particular focus on what’s happening locally. It is

worthwhile for someone in your collaborative to build a relationship with a reporter or editor on a community paper; if the paper begins to see you as a resource for information they need, they are more likely to use information that you send. For particularly important milestones (e.g., the opening of the one-stop-shopping family center), you may want to try to set up a meeting with the editorial board. In working with the media, it is valuable to shift your approach from, “We want you to promote our program” to, “Our mission is about creating a healthy community and how we can do that together.”

Transportation Posters: Bus companies and subways carry a certain number of community service posters for reduced fees or, in some cases, no fee at all. Posters can be an important way to reach many community people; for instance, to recruit for a particular program, send the message that you have particular information or resources available or provide a number to call. If you are creating a brochure and press releases for the one-stop-shopping family center, you might also use transportation posters to promote the center. Posters can have minimal design and color or be more highly designed; in either case, you will want to involve a graphic designer who is familiar with the requirements and knows how to interact with the transportation authority to achieve the correct specifications.

Information Packet: A simple folder, either designed or labeled with your organization’s name, logo, and contact information, can be the “briefcase” that holds some carefully selected materials (e.g., a cover letter; fact sheet; pamphlet or brochure; copies or clippings of newspaper articles on your agency, collaborative, or program; or a digest of a report on evaluation findings, or letters of support from local constituents or organizations). As part of establishing the one-stop-shopping family center, collaborative partners might meet with the City Council, the school committee, or the Chamber Of Commerce. For an important meeting of this kind, it is valuable to leave behind an information packet. Packets may also be selectively mailed to legislators, advisory board members, or other decision-makers.

Web Sites: Because of the dramatic growth of Internet access, more and more individuals and organizations are using the Internet as a primary source of information. Although the cost of creating and maintaining a dedicated Web site can be prohibitive, small organizations and collaboratives can gain access to the rapidly growing Internet audience by posting announcements and other

information on existing Web sites of larger social or public service organizations.

Each of these formats has advantages when used appropriately, and disadvantages when used inappropriately. For example, a press release leading to an article or editorial is too broad if your goal is to reach three to five major decision-makers. In that case, a scheduled meeting with a brief, carefully planned presentation is most likely to be effective—especially if you also bring a packet of materials to leave behind. It can be helpful to bring some constituents who are important to the legislator or advisory board member.

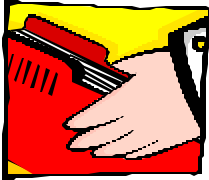
If you are trying to reach a broad segment of the community, a radio PSA, cable TV talk show segment, or press release followed by a phone call to arrange an article or editorial in a community newspaper or small daily will reach wide audiences. A highly designed brochure is too much if you are trying to leaflet a neighborhood and invite residents to come to a planning meeting. However, a brochure may be just right after the collaboration is under way and you are ready to sell—even at cost—training materials developed by your collaboration to others in a statewide, regional, or national network.

IV. GETTING IT DONE

Who is going to carry out these tasks? First, determine who in your organization has been in charge of ongoing marketing efforts. Has it been one person or several different people? What skills and experience do they bring? What other skills may be needed?

As a Head Start leader, you realize that you cannot do everything yourself and are accustomed to matching staff skills and experience to specific tasks. In this case, as one of the leaders in the collaboration, you are in a position to look at your own organization—and beyond. Look first within the collaboration team itself and ask about staff members that may be available. Discuss with the team the kind of person needed to carry out this work. Depending on the scope of the work, you may need one or two people with good interviewing and writing skills and someone with a feel for community networking and the ability to advocate for change. Or, you may be looking for someone with good organizing skills, the ability to create a strategic plan and bring it to the collaboration team for comment and sign off, and the capacity to enlist others in carrying out specific tasks. If you expect to produce designed products (e.g., a newsletter, bus poster, or brochure), you will need to budget for the production costs and possibly mailing and postage costs, even if you are able to secure design services for free.

It may be necessary to hire an outside designer, or even a social marketing/public communications consultant to plan the entire approach. However, there may be a wider pool of candidates in the collaborative to draw on without hiring an outside designer or consultant. It may be that the lead person taking on the public communication role will need the help of several staff people from different organizations who have the necessary skills. Like many other steps in building a collaboration, this presents an opportunity for the team to work for the good of the collaboration, beyond the self-interest of specific organizations.



HANDOUT: COMMUNICATING IN HARMONY

Suggested time: 5 min.

Read the following scenario and then proceed to Step 2, Worksheet.

Rosemary, the director of Harmony Head Start, is pleased that she, representatives of the Visiting Nurses Association (VNA), and Harmony Community Hospital have finally reached an agreement about providing health education to families of preschool children in Harmony.

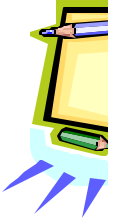
- The VNA will use 3 part-time health educators to provide 20 hours of training a week at locations around the town.
- Head Start staff will have input into the design and topics of the sessions.
- The VNA, Harmony Head Start, and the hospital will publicize the training schedule to attract as many parents of preschool children as possible.

Now that the negotiations are finally over, Rosemary realizes that the collaborative will need to begin a systematic set of communications with others in the community. The collaborative will need to describe the hiring of the family health educators and be clear on what the collaborative plans to do; otherwise, misunderstandings can occur.

Rosemary begins to think of what the collaborative will want to communicate. In addition to each group's internal staff, who in the community needs to know about the collaborative, and what do they need to know? She can think of several answers off the top of her head:

- Health care providers: they will need to know that the collaborative is taking steps toward prevention by hiring family health educators, how this may impact (and hopefully benefit) their own practices, and possible ways that they might interact with the collaborative.
- Leaders of other organizations that are not currently members of the collaborative: they may want to open their facilities and take advantage of the family health educators to offer free training to their own clients and members.

Leaning back in her chair, Rosemary feels better. There is good work ahead for the collaborative and she will contribute to that—even though she didn't end up with the family health educator on her staff.



STEP 2. WORKSHEET: ANALYZING THE SITUATION

Suggested time: 35 min.

Purpose: To give participants a chance to apply what they have learned to a case situation.

Part I (25 min.) Using the information from the Harmony case and drawing on your own experience in working in Head Start and other community organizations, choose one of the two audience groups (health care providers or community organizations) mentioned in the preceding handout.

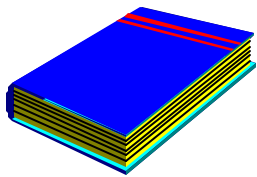
Continue the thinking that Rosemary began. First, write out the purpose of this outreach: what does the collaborative hope to achieve through these communications? Next, fill in as many answers as you can on the rest of the table below.

Element	Questions to Address
<i>Audience group</i>	Select one: Health care providers ____ Community organizations ____
<i>Purpose of the outreach:</i>	What do you want to achieve through your communications?
<i>Audience</i>	What specific individuals or groups of people do you want to reach?
<i>Channels</i>	Select one of the specific groups or individuals in your audience that you have identified. _____ Decide how you can best reach this group; brainstorm about possible channels: <ul style="list-style-type: none">▪ Neighborhood▪ Community▪ Faith institutions▪ Social clubs▪ Health centers▪ Social service agencies▪ Media (radio stations or community newspapers)

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<i>Message</i>	<p>What, specifically, do you want to say?</p> <p>What additional information (e.g., statistics or facts) will you need to obtain to strengthen the message?</p> <p>Does the message change (1.) with different audience segments or (2.) with different channels?</p>
<i>Format</i>	<p>Given the message and channel identified, what is the best format for reaching the chosen audience? How many formats will you use?</p> <ul style="list-style-type: none"> ▪ Presentations for scheduled meetings ▪ Targeted mailings ▪ Fact sheets ▪ Newsletters ▪ Brochures or flyers ▪ Press releases ▪ Newspaper articles or editorials ▪ Transportation posters ▪ Information packets ▪ Web sites
<i>Campaign</i>	<p>How will you put this together into an integrated plan with consistent, timed messages?</p> <p>What will be the steps?</p> <p>Timeline?</p> <p>Who will take the lead on each?</p>
<i>Tracking results</i>	<p>How will you know if the marketing campaign has been successful?</p>

Part II (10 min.) If you are working in pairs or a group, discuss your answers, why you gave them, and any points of difference.



STEP 3. BACKGROUND READING: CREATING A CLIMATE OF SUPPORT FOR COLLABORATION

Suggested time: 20 min.

Study the following reading. Feel free to highlight sections or write comments in the margin throughout these activities.

I. CREATING A CLIMATE OF SUPPORT—AREAS OF INFLUENCE

Whenever a Head Start program becomes involved in a set of discussions that lead to a partnership or a formal collaboration, a major focus is the communication between the leaders of the effort. This is true before, during, and after a partnership has been established. As national leaders in collaboration say, “Relationships need continuous work. You can’t just establish a partnership and be done with it.”⁶

At the same time, communication throughout the organizations and the larger community can support the development of the collaboration—just as the lack of these communications can lead to significant barriers to the collaboration’s success. Influencing others is a major task for collaboration leaders. In the context of a Head Start collaboration, it is valuable to think about four areas of influence:

- building awareness among staff and colleagues in your home organization
- positioning your organization to recruit and involve partners
- promoting the collaboration in the community
- reaching key decision-makers.

Someone on the collaboration team needs to have the skills and interest to manage a systematic process of communication so that the partnership can be effective in its efforts to influence different audiences in each of these four areas. Each audience segment can play a role in supporting the collaboration and its goals; each also has its own profile of interests and concerns. An important part of the collaboration’s early work is to think

⁶ Head Start Focus Group on Collaboration, Washington, DC, July 8–9, 1999.

through what each audience segment can contribute to the collaboration's success.

The social marketing concepts that we discussed in the Step 1 background reading can help with this process. As we think about ways to apply the concepts of social marketing to support a collaboration, it is useful to look more closely at the four audience groups and consider what can be gained by conducting outreach with each one. Whether you are participating directly in the formation of a collaboration or acting as a convener and brokering a partnership among others, it is useful to think about the benefits each concept may offer—and therefore the purpose of outreach to each—and key questions to consider.

Building Awareness Among Staff and Colleagues in Your Home Organization

Benefits: Local and Federal leaders will often take significant steps to identify potential partners, meet with them, and find themselves fairly far along on the path to collaboration; then, they suddenly encounter a formidable barrier close to home: their own staff. Staff and colleagues who have not been made aware of developments in the partnership can become alarmed, resentful, and difficult to work with at a crossroad where you may most need them to be productive and cooperative.

Staff who have been kept informed, on the other hand, can provide strong backing for the project and be a rich source of ideas and suggestions. One truism of management is that no one knows the systems of work like the staff who carry out the work on a day-to-day basis.⁷ Staff and colleagues are in a good position to see some of the implications of a partnership. They can help managers consider how best to adapt or modify existing systems, both in Head Start and in other partner agencies, in order to make the most of the new collaboration. Staff can also contribute ideas to the design of collaboration activities, so it is important to reach out to these staff members and their managers early on.

While experts agree that there are many places to begin a collaboration, and no one set of steps to follow, they also concur that one of the earliest and most essential steps to take focuses on internal staff.⁸ An essential question for partners in a potential collaboration, “What is everyone going to get out of this?” applies to your own internal staff as well.

⁷ Deming, W.E. 1993. *Out of the Crisis*, 20th printing. Cambridge, MA: MIT Press.

⁸ Head Start Focus Group on Collaboration, Washington, DC, July 8–9, 1999.

Key questions to address: Whether you are a leader in a local program or a Federal agency, discussions that you hold with managers, staff, and colleagues will address questions such as:

- What is the nature and purpose of this collaboration?
- Why do we want to pursue it?
- Who are the likely partners?
- Why do we want to be involved with them? What do they bring that enhances our own program capacity?
- What possible changes may occur in our home organization as a result?
- What concerns or worries might our own staff have as a result of talk of collaboration?
- How can we address these concerns directly and honestly?
- What strengths do our own staff bring to the collaboration that may enhance our new capacity and the potential professional development of others?
- What, specifically, would our own staff like to get from this collaboration?
- What suggestions do our staff have for ways to proceed with outside partners?
- In what ways would our staff like to be involved in building the collaboration?
- What do we notice about our own “organizational culture”—what might we need to explain or modify in dealing with another organization?

Not all of these questions need to be addressed in one meeting. At all stages of collaboration—Getting Together, Building Trust and Ownership, Developing a Strategic Plan, and Taking Action (see Activity 4-C, Collaboration: Managing Your Role)—there is a role for staff. However, staff input is particularly important in the “Getting Together” and “Building Trust and Ownership” stages.

In discussing a potential collaboration with your staff, it is wise not to get ahead of the process. Just as you don’t want to wait until the last moment to inform staff of developments with partners in collaboration, you don’t need to cover every possible turn of events in the first meeting either. Overall, line staff and managers can assist in carrying out several critical tasks in preparing for collaboration: internal assessment; reflection on organizational culture; considerations about resource allocation; and design, implementation, and evaluation of specific activities. Once activities are under way, staff can be especially helpful in answering questions such as, “What is working well?” and, “What practices do we need to adjust?”

As you think about ways to use social marketing concepts and tools to keep staff aware of the developments in a collaboration, see the reading below to

consider steps that Rosemary, the Harmony Head Start director, used to keep her staff informed.

MAINTAINING HARMONY

As Rosemary thought about the collaboration to provide health training for parents of preschool children, she recalled the challenging process in which she, Ricardo, and Jill engaged to reach an agreement. One area that went well, she thought, was communication with her own staff about the collaboration as it developed. She reviewed the journal where she kept notes of her participation in key events:

Jan. 15, preliminary meeting: Met with internal staff managers: presentation of the idea and discussion.

March 3, initial center meetings: Spoke with the manager to the full staff at each of the five Head Start centers. Each center wanted a slightly different degree of involvement and update (how often to meet, what level of detail to learn, etc.). It seemed like a lot of trouble, but my managers and I agreed that it was worthwhile. The proof will come in seeing staff contribute significant ideas and have few objections or problems.

March 10, memorandum sent to all staff: The collaboration partners meet on an irregular schedule, but the Head Start managers and I decided to provide all staff with a 1-page, written update at the end of each month. We worked together to construct a timetable so these updates would be delivered shortly before area meetings. This way each of the Head Start managers will have a ready-made forum where she can discuss with her staff any questions that arise.

May 1, formation of a Collaboration Council: Based at Head Start, the council consists not only of me and the managers but also of several parents and at least one staff person from each area.

June 5, a tailored letter: The letter was sent to all families via the family services manager. It informs parents and caregivers of the partnership discussions taking place and provides a contact name and number so that they can raise any questions or concerns.

Recruiting Partners

Benefits: On the local, State, and Federal levels, Head Start is engaging in collaborative activities with child-care programs, public assistance offices, adult education institutions, and job placement programs, to name a few. In some cases, Head Start may initiate the invitation to come to the table and explore collaboration; or one of the community or Federal agencies may take the first step. Either way, an important initial topic will be, “Who should be part of this collaboration?”

Experts report that collaborations begin in different ways (see Activity 4-C, Collaboration: Managing Your Role). Several groups may begin the collaboration with a plan in mind that arises from a common interest or concern. Alternatively, a few players may meet first and discuss who else should be brought in to participate. People may come together with a clear idea from the beginning about what they want to accomplish. Or they may come together because they share a common interest and clientele, and once they are together decide what direction their partnership should take.

“Recruitment” actually begins early on, as organizations get to know one another’s principles, mission, and activities, as well as challenges. An important tool in influencing others is a set of materials that can convey, in a clear and succinct way, central aspects of your agency’s work. Personal presentations, made informally over coffee or more formally at a meeting, may be the most effective way to describe your work. Nevertheless, written materials that people can use to reflect on what you’ve said are important, too. As groups in the community begin to emerge as potential partners, they will each need to provide more in-depth material (and plan to spend more time studying one another’s work). *A successful collaboration is made up of partners who bring the right complement of strengths, resources, and commitment to the mix.* The time and energy spent “asking the hard questions” and exploring the possibilities offered by the partners will pay off later. Like any partnership, a collaboration based more on wishful thinking than on knowledge will face significant odds as soon as difficulties arise.

Key Questions to Address:

- Who are the most likely partners?
- What additional partners do we want to consider, based on common mission, principles, and/or client base?
- What interests and concerns will our partners have and how can we address them?
- What key messages do we want to convey to partners about our own agency’s work?

- What materials do we have on hand that we can use to convey these messages?
- What new materials will we need to develop?
- What will be our process for completing those materials?
- What outreach activities will we plan?

Promoting the Collaboration in the Community

Benefits: Lawrence Wallack, professor in the School of Public Health, University of California at Berkeley states, “Media advocacy is a tactic for community groups to communicate their own story in their own words to promote social change.”⁹ Once partners come together and begin to make some plans, an important task is to figure out what—and how—to communicate to the community at large. It is always tempting to wait until the plans are finalized; however, word often gets around. As one expert points out, “If I don’t provide information myself after an important meeting, I know that the next day I will get three phone calls: one from a legislator, one from a reporter, and one from an advocate.”¹⁰ While not every partnership-building effort draws quite such high-level interest, the advice is still sound. People in the community are going to get wind of what you are doing; you’re better off being the one who decides what to tell them and in what way to tell them. In this way, you can build support and fend off apathy and opposition.

At the Federal level, too, it is important to delineate “the community” you want to influence. In the case of Federal employees, this may be a geographic description (consisting of the States in the region, and the region itself); or it may be a wider Head Start community—from State association directors up to the national Bureau and Head Start Association.

Key Questions to Address:

- Who, beyond our immediate partners, needs to have information about what we are doing (e.g., our client base; neighborhood or professional network; or community, State, regional, or national leadership)?
- What interests and concerns will these groups have and how can we address them?
- What (and how much) do we want each of these audiences to know at this time?
- If we are successful in reaching them, what do we want these audiences to do to support the collaboration?

⁹ Wallack, L., Dorfman, L., Jernigan, D., and Themba, M. 1993. *Media Advocacy and Public Health: Power for Prevention*. p. xi.

¹⁰ Andrew Kennedy, Los Angeles County Office of Education. Head Start Focus Group on Collaboration, Washington, DC, July 8-9, 1999.

- What are the best formats and outreach activities for communicating with each of the audiences?
- What materials do we have on hand that we can use to carry these messages?
- What new materials will we need to develop?
- What will be our process for completing those materials?
- What outreach activities will we plan? Who will carry the banner?

Reaching Key Decision-Makers

Benefits: There are always a few individuals and groups in the community at large that can make a difference in the outcome of your collaboration (e.g., advisory boards, boards of directors, and executive directors of other community agencies and organizations; the mayor, city councilmembers, and other municipal leaders; and State legislative aids and legislators). Newspaper editors, too, can be highly influential in creating a climate of support for collaborations taking place in the community.

It can be time well spent to think up-front about the decision-makers you want to reach and what you want them to do. By involving decision-makers in selected ways in the early stages of partnership efforts, you can position your agency as a resource for useful information. You can enlist the support of colleagues in high places who may help you on an ongoing basis, and you may create allies who can assist you if the collaboration runs into difficulties.

Key Questions to Address:

- Who are the decision-makers we want to target?
- What (and how much) do we want each of these audiences to know at this time?
- What interests and concerns will the audiences have, and how can we address them?
- If we are successful in reaching them, what can these groups do to support the collaboration?
- What is the best way to deliver messages to each of the audiences (format and outreach)?
- What materials do we have on hand that we can use to carry these messages?
- What new materials will we need to develop?
- What will be our process for completing those materials?
- What outreach activities will we plan?

Head Start leaders who have been involved in various forms of partnership usually find that they have experience in making efforts to influence others

in their home organizations and in the wider community. The Step 4 worksheet that follows will give you the opportunity to think about ways in which social marketing tools can be used to influence others.



STEP 4. WORKSHEET: USING MARKETING TOOLS TO INFLUENCE OTHERS

Suggested time: 35 min.

Purpose: This worksheet will help you reflect on ways to apply social marketing tools and activities in your organization or collaboration.

Part I (10 min.) Write a simple statement that describes a collaboration planned or under way in your community. (Or, if you prefer, draw on the collaboration under way in the Harmony case in Activity 4-D.)

The following collaboration is under way in my community:

Social marketing tools can be used to:

- build awareness among staff within your organization
- recruit and involve partners
- promote collaboration in the community
- reach key decision-makers

Use the chart below to see which tools and activities you might use to accomplish each purpose:

	Building awareness among staff within your home organization	Recruiting and involving partners	Promoting the collaboration in the community	Reaching key decision-makers
Presentation for scheduled meetings				
Targeted mailing/tailored letter				
Fact sheet				
Newsletter				
Brochure/ pamphlet/flyer				
Press release				
Newspaper article or editorial				
Transportation poster				
Information packet				

Part II (15 min.) Although some of the marketing tools listed above (e.g., targeted mailing or press release) need to be developed specifically for a particular purpose or event, many have multiple uses. Use the chart that follows to evaluate your own organization's existing portfolio of marketing tools. Feel free to add questions. (If your organization is part of an existing collaborative, you may evaluate the collaborative's portfolio instead.)

MARKETING TOOL	QUESTIONS TO CONSIDER	YES or NO
Presentation for scheduled meetings	<ul style="list-style-type: none"> ▪ Do we have a prepared generic presentation about our organization or collaboration? ▪ Do we have audiovisual aids (e.g., overhead transparencies or PowerPoint slides) to highlight key points? ▪ Can the presentation be easily modified to include new information? 	
Fact sheet	<ul style="list-style-type: none"> ▪ Do we have a fact sheet with current information about our organization or collaboration? ▪ Is the information displayed in an attractive, easy-to-read manner? ▪ Do we encourage staff to distribute the fact sheet at meetings that they attend? 	
Newsletter	<ul style="list-style-type: none"> ▪ Do we regularly produce a newsletter? ▪ Do the newsletter's design, format, and content present our organization in a positive light? ▪ Do we use the newsletter for multiple purposes? 	
Brochures, pamphlets, or flyers	<ul style="list-style-type: none"> ▪ Do we have a brochure that tells about our organization? ▪ Do its design and content convey the stability and importance of our organization? 	
Relationships with news organizations	<ul style="list-style-type: none"> ▪ Do we have a relationship with an editor or reporter from our local community newspaper? ▪ Do we invite the reporter to cover events in our organization? ▪ Do we regularly submit photographs or human-interest articles to the paper? 	
Information packets	<ul style="list-style-type: none"> ▪ Do we have an information packet for our organization? ▪ Is all of the information in the packet current? ▪ Is there a supply of prepared packets ready to distribute to visitors or use for meetings? 	

Part III (10 min.) If you are working in pairs or a group, discuss your answers, why you gave them, and any points of difference.



STEP 5. SUMMARY

Suggested time: 10 min.

KEY POINTS

- the value of social marketing
- areas of influence in Head Start collaboration
- the importance of targeted, ongoing communication in collaboration
- the step-by-step process for promoting a collaboration
- resources available to support the social marketing of the collaboration

PERSONAL REVIEW

What did you learn from this activity?

1. _____

2. _____

3. _____

How will you use your new knowledge and skills in your work?

1. _____

2. _____

3. _____

What other things do you think you might need to learn in order to master the skill of influencing others?

1. _____

2. _____

3. _____

